



2011 CALIFORNIA VOLUNTEER REFERENCE MANUAL – Volunteer Procedures

Responsibility of the Volunteer

As a volunteer tax assistant, be careful to:

- Use the correct forms.
- Provide your clients accurate information.
- Follow the procedures and instructions in this manual.
- Complete a volunteer information sheet each tax season.

Volunteers help their clients complete tax returns. You are not a professional preparer. You do not have any legal responsibility regarding the accuracy of the tax returns you complete. Make sure your clients know that they assume legal responsibility for their tax return.

Confidentiality of Information

All tax return information is **confidential**. As a volunteer, under no circumstances, discuss information about any of the tax returns you prepare. Do not retain tax information from an individual's tax return. Do not jeopardize the credibility of the VITA/TCE program by disclosure of information to unauthorized individuals. To enhance the privacy of clients who come to a site, arrange the assistance area so that others cannot see or overhear information exchanged between the volunteer and the client.

Privacy Act Information

If a person requests information about the Federal Privacy Act or the California Information Practices Act of 1977, refer them to Franchise Tax Board's public assistance number, **800.852.5711**.

Acceptance of Payment

Under no circumstances accept any form of payment either for your services or on behalf of Franchise Tax Board.

Questions or Assistance Unrelated to Personal Income Tax Law

VITA/TCE trains volunteers to assist in the preparation of personal income tax returns. If a person requests help on personal income tax laws other than those within the program scope, refer the person to Franchise Tax Board's public assistance number. If a person requests help on matters other than personal income tax, suggest that they seek help elsewhere.

Site Number/SIDN

The IRS assigns every volunteer site a site number (SIDN). Include this number and your initials on all tax returns for identification purposes, including e-filed tax returns.



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Quality Review

During training, the instructor gives the site coordinator two self-addressed, stamped envelopes for the volunteer to give to the first two paper tax return, **refund only** clients you assist. The trainer, a Franchise Tax Board field office employee, reviews the tax return. After review, the field office forwards the tax returns to Franchise Tax Board in Sacramento. The review process allows us to identify error trends early and avoid future mistakes. This is in addition to the quality review program used at your site. Efile sites use the federal Quality Review sheet.

Replenishing Your Supply of Forms

To replenish your supply of state forms and publications, complete Form 2333V-CA and return it to Public Education Team. You may also call the Volunteer Hotline, **800.522.5665**, to order forms, or email an order to:

volunteercoordinator@ftb.ca.gov

The volunteer hotline assists with tracking forms order shipments, as well as tax preparation and volunteer program advice and assistance. Reach the Volunteer Hotline program staff, 8:30 a.m. to 4:30p.m., weekdays, except state holidays, at **800.522.5665**. There is a voicemail option after hours.

Change in Service Hours or Location

An effective volunteer program is open and staffed during publicized hours. If you plan to be absent, arrange in advance for another volunteer to provide assistance during your assigned time.

If you change the hours or location of your volunteer site:

1. Call the Volunteer Hotline and inform them of the following:
 - That you volunteer for the VITA/TCE program.
 - The present location of your site (including county and ZIP code).
 - The change in hours or location.
2. Notify the organizations, media, and other persons whom you previously contacted regarding publicity.
3. Correct or remove the posters distributed throughout the community so the public does not go to the old location or to a closed volunteer site.



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Site List

We update our volunteer site list continually during the filing season, January through April 15th each year. We distribute copies of a paper list to agencies by request. The site list is also on the Internet at **ftb.ca.gov** and available as a mobile application. We update the Internet site list weekly. Your timely updates are important. Any change in service hours, location, or contact numbers may be updated within 24 hours, if necessary.

Publicizing Your Program

To a great extent, volunteer program success depends on how many people know about the service you provide. As a member of your local community, you know the activities, organization, and individuals that help get information out to the public. If you take it upon yourself to get the word out about the program, it helps guarantee the success of your individual volunteer site.

One of the most effective ways for you to publicize VITA/TCE is through “word of mouth.” If you tell five people about the program and they each tell five people, you effectively advertise the program. Remember, you provide a valuable service, so talk to as many people as possible.

A close second to word of mouth publicity is referral from local leaders and community agency personnel. Talk to your pastor, prominent citizens, local government officials, and representatives of local clubs. Ask them to spread the information about your program and to refer interested people.

If you belong to a club or organization, or plan to attend a luncheon, ask for a few minutes to speak about the program. If you know of a church bulletin, church newsletter, senior citizen paper, or local throwaway (a free paper usually passed out at grocery stores), ask the publishers to print your volunteer site location, dates, and times as a community service. They might even print a small story about the program.

FTB sends volunteer program posters to your sponsor and coordinator. Put the posters where you think they get the best exposure (i.e., a bulletin board, store window, library, church, bank, senior citizen home, etc.).

Remember, anyone visiting your volunteer site is a possible information source. If you provide good service, this person recommends your service to someone else.